

PRO-P2 Baylor Review Guide

Intake Sheet, page 1, Shaded Area

1: No	2: No	3: Yes	4: Yes	5: Yes
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E-file created: Yes

AGI: 52,303

Refund/(Amount owed): 697

Diagnostics:

Errors: None

Warnings: There is a refund on the tax return and no direct deposit information has been filled in. Is this correct? (W49)

Overridden Entries: None

Estimated Entries: Dependent on Template used to create return

Federal

Form	Payee/Name/Line	Comment/Reference
Main Info	Name line 2	% Ben A Baylor
	Email address	BENBAY@MAIL.COM
	Cell phone / Taxpayer	609-555-1234
	Taxpayer Information	Date of death, Spouse: 06/21/2013
	Filing Status	Married filing jointly
	Dependents	Madison Chambers: Mo in Hm=09; Code=1; EIC box checked Check that Chambers is spelled correctly as shown on the SS Card. Discuss with preparer that it should be changed on the Intake sheet.
1040 Wkt1	Medicare Parts B, C for Taxpayer	Best Practice: enter Part B [1,335] & Part D [426] using a scratch pad, (or can enter Part B directly here, Part D on A Detail)
1040 Wkt 7	Line 1	1,200
1040 Pg 1	Box above Line 10	No
	Line 21	"GAMBLING WINNINGS"
Sch A	Line 1	Unreimbursed medical and dental expenses: 15,155
	Line 5a	0
	Line 5b	CHECKED, 2,220
	Line 6	Total =3,949 Primary residence real estate taxes on 3 rd line: 3,498; Scratch pad from 4 th line with empty lot taxes (+) and PTR rebate (-)
	Line 28	GAMBLING LOSSES, 1,200
	Line 29	22,166
Sales Tax (NJ)	Line 8	Scratch Pad Attached to Line 8. Amount 1,400 Sales Tax on New Car
A Detail	Medical miles	1,116
	Medical	Doctors = 4,723

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		Hospitals =5,168 Prescription drugs = 1,756 Prescription Glasses = 210 Total =15,155
	Cash contributions 50% Limit Organizations	Church: 850, PBS: 201
	Other than cash contributions 50% Limit Organizations	Salvation Army: 350
Dividend Stmt	The Lone Star Fund	Capital gain: 737
W-2G	Line 3	NJ Lottery
	Gambling losses	2,550
	Box left of line 13	CHECKED
1099-R	Defense Finance & Accounting	State Box 2 CHECKED [Active duty military retirement]
1099-R	Harris Trust	State ID number should be in line 13
Prep Use	Line 11	NONE
	Line 12	NO
	Line 13	Preparer Initials
	Line 14	Not filled in (filled in by mentor)
All	TSJ boxes	Blank or correct use of T, S, J

New Jersey

Form	Payee/Name/Line	Comment/Reference
NJ 1040 Pg1	County/Municipality code	0101
NJ 1040 Pg2	Gubernatorial Fund	Taxpayer: No Spouse: No
	Line 19a [Pensions, ...]	13,223
	Line 19b	Scratch Pad Attached and reads Harris Trust Gross Pension.....13,999 Harris Trust Taxable Pension-13223 Total for Line 19b = 776
	Line 28 [NJ Gross Income]	0
	Line 30 [Medical Expenses]	15,155
	Line 37a [Total Property Taxes Paid]	Scratch pad added. Total property tax paid less PTR base. 3,498-3303 Amount on line 37a= 3,498
NJ1040 Pg 3	Line 37b [Check here if on October 1, 2012 you were a NJ homeowner]	Checked
	Line 37c [Property Tax Deduction]	0 [From Worksheet F]
	Line 38 [NJ Taxable Income]	0
	Line 48 [Total NJ Income Tax Withheld]	0
	Line 49 [Property tax credit]	50 [From Worksheet F]
	Line 66 [Refund]	50

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	Worksheet F, Line 1, Property taxes	PTR Base Amount = 3,303
NJ DD Wkt	Direct Deposit and Direct Debit . . .	Check to have check mailed
NJ Ret Wkt	Line 10a [. . . receiving Social Security . .]	Yes